

Advanced Strategic Sourcing Workshop



Harvest Procurement Innovation

Agenda

- The Bidders perspective
- Using a Template to Create an Event
- RFP Development and Evaluation
- Latest Tips and Tricks



eSupplier: The bidder's perspective

Welcome STAR Testing

 **eSupplier**

My INFORMATION

ACCOUNT OPTIONS

- My NIGP Codes
- My Responses
- My Profile
- My Communications

Company
STAR Testing

Logged in as
STARTESTING

Your Bidder ID
0000001228



ANNOUNCEMENTS

The Wisconsin eSupplier Portal for bidders provides easy access to information about state agency bidding opportunities related to purchases of goods and services. This portal will also be the source for bidders to manage their company information, replacing this feature of VendorNet. For more information about this transition, see [VendorNet](#).



No Announced Upcoming Solicitations Match Your NIGP Codes

CURRENT SOLICITATIONS

No solicitations match your NIGP codes, at this time

[SEARCH SOLICITATIONS](#)

Note, all times are local Madison WI - Central Time

HELP DESK

Questions related to Solicitations
Please reference the Agency Contact on the solicitation page.

General Procurement Questions
State Bureau of Procurement
Email: DOAWISPro@wisconsin.gov
Phone: (800) 482-7813 (U.S. only) or 608-264-7897
Hours: 7:30 am – 6:00 pm CST (M-F)

Technical Questions
Email: STARSupport@wisconsin.gov
Phone: (844) WIS-STAR (947-7827)
Hours: 7:30 am – 6:00 pm CST (M-F)

My NIGP Codes: Bidders add NIGP codes



eSupplier

My NIGP Codes

ADD NIGP CODE(S)

DELETE NIGP CODE(S)



	*NIGP CODE	DESCRIPTION		
<input type="checkbox"/>	ALLITEMS	All Items		

SAVE

CANCEL

RETURN TO HOMEPAGE



Bidder Response Page

ONLINE SOLICITATION RESPONSE FORM

CLASS 3 PRINTING OF HEAT SET WEB BOOKLET PUBLICATIONS COLLATED AND/OR BOUND DIGEST OR MAGAZINE SIZES

Download Main Document

Response Due Date/Time: 11/15/2018 2:00PM

SECTION #	TITLE	ENTER RESPONSE	READ SECTION	ASK A QUESTION
	COVER PAGE AND BID RATES			
2.2	MANUFACTURING			
4	SPECIAL TERMS AND CONDITIONS OF BID			
4.8.2	Purchase Card			
5.1 (3)	METHOD OF BID			
5.1 (2)	METHOD OF BID			
5.1 (1)	METHOD OF BID			
5.1 (4)	METHOD OF BID			
6.5.2	Hard Copy Bid Submittal			
7.4	METHOD OF AWARD			
8	REQUIRED FORMS			

[SAVE](#) [SUBMIT](#) [UPLOAD FILE](#) Show All Sections [RETURN TO HOMEPAGE](#)

Response Status: Not Submitted

Legend

-  Response is required
-  Response is optional
-  You've visited this item
-  Review the section details
-  Ask question about this section



My Responses: Bidders review their solicitation responses



My Responses

[Personalize](#) | [Find](#) | [View All](#) | First 1-3 of 3 Last

EVENT NUMBER	RESPONSE #	SOLICITATION REFERENCE #	TITLE	STATUS	SUBMITTED DATE/TIME	WITHDRAW	DOWNLOAD
10335	1	RFB #28288-JM	Fuel Oil	Submitted	07/03/18 3:29PM	✗	
10378	1	TESTING	Question due date	Submitted	06/20/18 9:27AM	✗	
10384	1	NUMBER BID FACTOR	Testing if the text is correct	Submitted	06/28/18 9:56AM	✗	

[RETURN TO HOMEPAGE](#)



Bidder ID 0000001228

Company Information

Company Name

Employer / Tax ID# Enter EIN / Tax ID without hyphen

*Email

- Veteran Owned Small Business
 Minority Owned Business Disabled Veteran Owned Woman Owned Busn. Enterprise

Address

Country

Address 1

Address 2

Address 3

City

State

Zip/Postal

Phone Ext

Contact Information

First Name

Last Name

Title

Phone Ext

SAVE

RETURN TO HOMEPAGE

My Profile:

Bidders enter and update profile information

Bidder ID 0000001228

Company Information

Company Name

Employer / Tax ID# Enter EIN / Tax ID without hyphen

*Email

- Veteran Owned Small Business
 Minority Owned Business Disabled Veteran Owned Woman Owned Busn. Enterprise



My Communications: Bidder's received emails



My Communications

Find First 1-2 of 2 Last

SUBJECT	STATUS	SENT DATE/TIME
State of Wisconsin Solicitation TESTING, Event 10378	Not Read	10/10/2018 2:45:07PM CDT
State of Wisconsin Solicitation TESTING, Event 10378	Answered	06/01/2018 1:46:05PM CDT

[RETURN TO HOMEPAGE](#)



My Communications: Bidder's view and reply

Bidder Communications

REGARDING SOLICITATION

Event Number: 10378
Title: Question due date
Reference #: TESTING

COMMUNICATION FROM THE STATE OF WISCONSIN

Subject State of Wisconsin Solicitation TESTING, Event 10378 **Date Sent** 10/10/2018

In the event of a catastrophic failure at your facility, what contingency plans do you have in place?

[REPLY](#) [RETURN TO MY COMMUNICATIONS](#)



My Communications: Bidder's view replying

Bidder Communications - Reply

REGARDING SOLICITATION

Event Number: 10378
Title: Question due date
Reference #: TESTING

COMMUNICATION FROM THE STATE OF WISCONSIN

Subject: State of Wisconsin Solicitation TESTING, Event 10378 Date Sent: 10/10/2018

In the event of a catastrophic failure at your facility, what contingency plans do you have in place?

REPLY TO THE STATE OF WISCONSIN

We have multiple facilities with comparable equipment in each. In the event of a catastrophe at the primary facility, we have the ability to move to another facility within 72 hours.

ADD ATTACHMENT

SEND CANCEL



Bidder Communications: Sourcing manager's view in SS

Email Bidders

New Email | Outbox | **Inbox**

Emails from Bidders Find | View All | [Calendar Icon] First 1-2 of 2 Last

Bidder ID	Company Name	Subject	Status	Date/Time
0000001228	STAR Testing	Re: State of Wisconsin Solicitation TESTING, Event 10378	Read	10/10/2018 4:40:05PM
0000001228	STAR Testing	Re: State of Wisconsin Solicitation TESTING, Event 10378	 Read	06/01/2018 3:08:16PM

Message

We have multiple facilities with comparable equipment in each. In the event of a catastrophe at the primary facility, we have the ability to move to another facility within 72 hours.

[Return](#)



Announce Event Online: Bidder's view on eSupplier

Business Unit/Agency:  Dept of Ag, Trade & Cons Protc

Announce Event Online

Synopsis:

ANNOUNCEMENTS

The Wisconsin eSupplier Portal for bidders provides easy access to information about state agency bidding opportunities related to purchases of goods and services. This portal will also be the source for bidders to manage their company information, replacing this feature of VendorNet. For more information about this transition, see [VendorNet](#).



All Upcoming Solicitations

SOLICITATION REFERENCE	TITLE	AGENCY	AVAILABLE (TARGET)	
RD190093	WI Lottery Megabucks with Lightning Ball Fact Card and Dangler	DOR	10/23/18 12:00AM	

Note, all times are local Madison WI - Central Time

Solicitation Synopsis

Solicitation Reference # RD190093

Fact Card
QTY: 100,000

Size: 3 1/2" x 9 1/4"
Ink: 4 Color both sides, full bleeds (4/4)
Stock: 10pt C2S
Finishing: Trim to size
Package: Bundles of 25 wrap banded or shrink wrapped
Box: No more than 40 lbs per box

Dangler
QTY: 4,000
Size: 7 1/2" x 11"
Ink: 4 Color both sides, full bleeds (4/4)
Stock: 12 mil Vinyl or Similar
Finishing: Die Cut and apply double sided tape with liner to front top
Package: Bundles of 25 or 50 wrap banded or shrink wrapped
Box: No more than 40 lbs per box

[Return](#)



Using a Template to Create an Event



Shortcut to Sourcing Events:

- Go to the landing page of your event
- Click on “Add to Favorites” located on the top right side of the page
- Enter a description of your event in the pop-up window
- The event will now appear in your “Favorites” list on the top left of the page

Advantages to working with a template:

- Always using the newest template
- Using the copy feature for future solicitations
- Document is consistent
- Table of contents is created and updated by tool
- Easy to copy/paste from other documents

Use the text editor to create subsections:

- Subsections that don't have titles can be created using the indent arrows
- Make the numbers bold



Pull a Word document from the tool, save as a Word Document (*.docx). Undo “Lock Tracking,” turn on “Track Changes” to edit. This version will not have exact formatting the text editor shows

Remember Bidders see only the PDF document which will show the formatting used in the text editor

Use “New Window” to:

- Open other events to copy/paste pervious language etc.
- Use Word to find changes you’d like to make (must to shall, things to capitalize etc.) and then make them in the SS tool
- Incorporate tracked changes into the SS tool

Bid Factors:

- Uncheck “Custom Bid Factor”
- Choose a Bid Factor ID
- Re-check “Custom Bid Factor” to edit the Bid Factor ID
- If you have similar bid factors, copy/paste from one to another



RFP Development and Evaluation



Harvest Procurement Innovation

Sourcing Event

Event Number: 10069

Event Type: Request for Proposal

Event Status: Award Phase

Solicitation Reference #: RD180748

Title: Cigarette Tax Stamp Printing and Distribution Services

Business Unit/Agency: 56600 Department of Revenue

Announce Event Online

Synopsis: Manufacture and distribute heat applied Wisconsin cigarette tax stamps at a competitive cost that utilize both overt and covert protective security features to protect the Wisconsin cigarette tax revenues. These features must help inhibit the illegal reproduction and removal of the stamp once applied while enabling distributors, state and local enforcement agents, state auditors, retailers and consumers to easily recognize the stamp as a legal Wisconsin (tribal or non-tribal) stamp.

Event Dates

Available to Bidders: 10/20/2017 at 2:00PM CDT

Questions Close: 10/31/2017 at 2:00PM CDT

Response Due: 11/28/2017 at 2:00PM CDT

Agency Contact

Name: Dan Wilson

Email: dan.wilson@wisconsin.gov

Phone: 608/264-9587 Phone Ext.: Fax:

Development Tasks

Main Document & Bid Factors	Review
Supporting Documents	Review
Assign NIGP Codes	Review
View as Bidder	Review
Share Draft Bid Document	Review
Define Scoring	Review
Approval	Review
Post Event	N/A

Administrative Tasks

Manage Administrative Docs	Go
Manage Event Security	Go
Bidder Communications	Go
Event Q&A	View
Proxy for Bidder	View
Select Responses for Scoring	View
Evaluation Progress	View
Award	View

Sourcing Event Page:

Sourcing manager's
view in Strategic
Sourcing



Development Tasks: Main document and bid factors

Document Management

Document Type

Template Based Uploaded / Bid Factors Only

Upload Main Document

Find | View All First 1-2 of 2 Last

	Content Hierarchy			Title	Bid Factors
<input type="checkbox"/>	1		∨	PROPOSAL RESPONSE	☰
<input type="checkbox"/>	2	∧	>	Cost Proposal	☰

Delete Checked Renumber Clear All

Save Return



Development Tasks: Define Scoring - uploaded

Setup Scoring

Event Number: 10069

Title: Cigarette Tax Stamp Printing and Distribution Services

Scoring Parameters

Rating Scale: 3050

Total Points: 3600

Distribute

Calculate

Clear/Start Over

Point Assignment

Section Title

1 PROPOSAL RESPONSE

\$:



Lock by
Points

Points
3050

Percent
85

2 Cost Proposal

\$:



Points

550

15

Save

Return

Development Tasks: Define Scoring – rating scale

Rating Scale	Evaluator Score	Section Points	Weighted Section Points
0 - 10	8	100	80
0 - 10	3	50	?
0 - 10	5	200	?
0 - 10	6	500	?



Development Tasks: Define Scoring – template

Setup Scoring

Event Number: 10494
Title: Actuarial Consulting Services - Property and Casualty Insurers

Scoring Parameters

Rating Scale: 10 Total Points: 750

Point Assignment

<u>Section Title</u>	<u>\$:</u>	<u>Lock by</u>	<u>Points</u>	<u>Percent</u>
5 GENERAL REQUIREMENTS (300 POINTS)	<input type="checkbox"/>	Points	300	40
5.1 Organizational Capabilities #1	<input type="checkbox"/>	No	100	33
5.2 Organizational Capabilities #2	<input type="checkbox"/>	No	100	33
5.3 Staff Qualifications	<input type="checkbox"/>	No	100	33
6 TECHNICAL REQUIREMENTS (300 POINTS)	<input type="checkbox"/>	Points	300	40
6.1 Technical Requirement #1	<input type="checkbox"/>	No	150	50
6.2 Technical Requirement #2	<input type="checkbox"/>	No	150	50



Administrative Tasks: Select responses for scoring

Event Responses

Event Number: 10440

Title: Melissa Viken - End-to-End RFP Score and Award

Response Due Date: 03/26/2018 **Response Due Time:** 2:00PM CDT

Event Status: Closed/Under Review

Bidder ID	Company Name	by Proxy	Bid Response Status	Bid Response Submitted	Evaluation Status	View	Pass	Reject	Exceptions	Email Bidder
0000000007	The HON Company LLC	<input checked="" type="checkbox"/>	Submitted	03/22/18 9:27AM	Reviewed/Pass		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
0000000019	PCC Technology Inc.	<input checked="" type="checkbox"/>	Submitted	03/24/18 10:39AM	Reviewed/Pass		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
0000000029	Image Keepers, Inc., dba HVS Advertising	<input checked="" type="checkbox"/>	Submitted	03/23/18 11:54AM	Reviewed/Rejected		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
0000001228	STAR Testing	<input checked="" type="checkbox"/>	Submitted	03/26/18 1:51PM	New		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Release for Evaluation

Save

Return



Evaluator Email

Please evaluate the responses to the following:

Title

Solicitation Ref #

Synopsis

Please click [HERE](#) to complete your evaluation.

Your User ID is **SSBUTCHS3**

Your temporary password is **PNNHAW2JL2#**



Evaluate Bidder Responses

EVALUATE BIDDER RESPONSES

EVENT NUMBER	TITLE	SOLICITATION REFERENCE #	SCORING ROUND	STATUS	EVALUATE
10440	Melissa Viken - End-to-End RFP Score and Award	DOA_MGR_01 E2E RFP2	1	Not Started	
10441	Melissa Viken - End-to-End RFP Score and Award	DOA_MGR_02 E2E RFP2	1	Completed	



ACTUARIAL CONSULTING SERVICES - PROPERTY AND CASUALTY INSURERS

Event Number: 10494

Solicitation IN190771

Reference:

Due to an eSupplier system disruption, the Proposal due date has been extended to 5:00PM CT on Wednesday, September 19th.

Bid

Synopsis

This RFP is to obtain a Contract for Actuarial Consulting Services on an hourly rate basis to assist OCI in the financial examination of domestic insurers. OCI performs approximately fifty (50) examinations of domestic insurers annually. OCI uses actuarial consultants on examinations of larger insurers, as well as life and fraternal insurers with significant exposures to interest sensitive products and/or principle-based reserves, and property and casualty insurers with significant exposures in long-tailed lines of business. OCI expects to utilize actuarial consultants on 10% to 20% of its examinations during the term of the Contract. OCI may also use actuarial consultants on occasion when technical assistance is needed outside the examination process.

Scoring Round: 3

Available Responses to Evaluate

BIDDER ID	NAME	MY SCORING STATUS	SCORE POINTS	
0000000176	Actuarial Solutions	Not Started	435	
0000000331	Taylor-Walker Consulting, LLC	Not Started	465	
0000002335	AMI Risk Consultants, Inc.	Not Started	420	
0000002378	Merlinos & Associates, Inc.	Not Started	455	
0000003466	INS Consultants, Inc.	Not Started	435	
0000003492	1969	Not Started	420	
0000003557	American Actuarial Consulting Group LLC	Not Started	415	

Legend

-  Evaluation Pending
-  Submitted Evaluation

RETURN

Evaluate Bidder Responses: Summary page



Evaluate Bidder Responses: Bidder response

ACTUARIAL CONSULTING SERVICES - PROPERTY AND CASUALTY INSURERS

Event Number: 10494

Bidder ID: 0000000176

Actuarial Solutions

Scoring Round: 3

Total Score Points: 0

[Download Main Document](#)

SECTION TITLE	SCORING CRITERIA	MY SCORE	SCORE POINTS	MAXIMUM POINTS	EVALUATE/REVIEW
5 - GENERAL REQUIREMENTS (300 POINTS)					
5.1 - Organizational Capabilities #1	?	<input type="text" value="0"/>	0	100	
5.2 - Organizational Capabilities #2	?	<input type="text" value="0"/>	0	100	
5.3 - Staff Qualifications	?	<input type="text" value="0"/>	0	100	
6 - TECHNICAL REQUIREMENTS (300 POINTS)					
6.1 - Technical Requirement #1	?	<input type="text" value="0"/>	0	150	
6.2 - Technical Requirement #2	?	<input type="text" value="0"/>	0	150	

Additional Attachments Received from Bidder

WI_FinExam_PC_Insurers_Proposal_9-2018.pdf 09/18/2018 2:02PM

Legend

- Evaluation Pending
- You've visited this item



Evaluate Bidder Responses: Evaluate bid factor

Evaluate Bid Factor

Bidder ID: 000000176 Actuarial Solutions

5.1 - Organizational Capabilities #1

My Score: (Maximum score is 10)

Scoring Criteria

Excellent (8 - 10 points) – The Proposer effectively demonstrated that it has the resources, capabilities, and work experience to provide the requested services. The firm is clearly experienced with the Risk Focused Examination approach and ORSAs, and identified at least five (5) examples of projects and dates of relevant work experience covering a broad range of insurers and/or specialties, thus demonstrating versatility and a broad range of expertise. A reduction should be made if the Proposer failed to include any disclosure of work performed for Wisconsin insurers in the last five years or disclosed numerous potential conflicts.

Good (5 - 7 points) – The Proposer demonstrated the organization's resources, capabilities, and work experience in providing similar services, including a familiarity with the Risk Focused Examination approach and ORSAs. The Proposer identified several examples of projects and dates of relevant work experience including experience with Risk Focused Examinations. A reduction should be made if the Proposer failed to include any disclosure of work performed for Wisconsin insurers in the last five years or disclosed numerous potential conflicts.

Fair (2 - 4 points) – The Proposer attempted to demonstrate the organization's resources, capabilities, and work experience in providing similar services, but the description was lacking in either quality or details. The Proposer identified few relevant examples of projects and dates of work experience including experience with Risk Focused Examinations. A reduction should be made if the Proposer failed to include any disclosure of work performed for Wisconsin insurers in the last five years or disclosed numerous potential conflicts.

Poor (0 - 1 points) – The Proposer failed to demonstrate the organization's resources, capabilities, or work experience, or the Proposer's experience does not seem to cover similar services; e.g., they provide experience in Workers Compensation rates instead of an examination. They did not identify any relevant projects and dates of similar work experience.

Comments

The Bidder's Response

Describe your organization's available resources, areas of experience, and capabilities in providing similar services to those required in this RFP.

- Include Risk Focused Examinations and ORSA reviews.
- Identify projects, dates, and results.
- Include a disclosure of work performed by the Proposer, including other offices of the same firm, its principals, or proposed Team Members, for any Wisconsin-domiciled insurer and/or its affiliates in the five (5) years prior to this Proposal.

refer to attached proposal



Evaluate Bidder Responses: Bidder response completed

ACTUARIAL CONSULTING SERVICES - PROPERTY AND CASUALTY INSURERS

Event Number: 10494
 Bidder ID: 0000000176 Actuarial Solutions

Scoring Round: 3
 Total Score Points: 435

[Download Main Document](#)

SECTION TITLE	SCORING CRITERIA	MY SCORE	SCORE POINTS	MAXIMUM POINTS	EVALUATE/REVIEW
5 - GENERAL REQUIREMENTS (300 POINTS)					
5.1 - Organizational Capabilities #1	?	7	70	100	✓
5.2 - Organizational Capabilities #2	?	8	80	100	✓
5.3 - Staff Qualifications	?	6	60	100	✓
6 - TECHNICAL REQUIREMENTS (300 POINTS)					
6.1 - Technical Requirement #1	?	7	105	150	✓
6.2 - Technical Requirement #2	?	8	120	150	✓

Additional Attachments Received from Bidder

WI_FinExam_PC_Insurers_Proposal_9-2018.pdf 09/18/2018 2:02PM

Legend

- Evaluation Pending
- You've visited this item

SAVE SUBMIT CANCEL/RETURN



Download Event Documents:

Main Menu > State of Wisconsin (STAR) > Strategic Sourcing > Enterprise Administration > Download Event Documents

Download All Documents

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Search by: =

[Advanced Search](#)

Download All Documents

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Search by: begins with

[Advanced Search](#)

Search Results

View All

First 1-4 of 4 Last

Business Unit	Event Number	Title	Event Definition ID	Event Type	Status Description
14500	10367	Actuarial Consulting Services	DEFAULT	RFP	Evaluation
14500	10494	Actuarial Consulting Services - Property and Casualty Insurers	DEFAULT	RFP	Evaluation
14500	10517	Actuarial Services for the State Life Insurance Fund	DEFAULT	RFP	In Development
14500	10537	Actuarial Services for Health Rate Review	DEFAULT	RFP	In Development



Download Event Documents

Download All Event Related Documents

Event Number 10304 Business Unit 50500 Event Status Award Phase
Event Type Request for Bid
Title Janitorial Services at Tommy G Thompson Center

▼ Reports

- Download All Attachments
- Event Bid Factors
- Event Bidder List
- Event Communications
- Event History
- Event NIGP Codes
- Event Q&A
- Event Users
- Bidder Response Summary
- Bidder Responses
- Single Bidder Response

[Return to Search](#) [Previous in List](#) [Next in List](#)

Download All Event Related Documents

Event Number 10332 Business Unit 14400 Event Status Award Phase
Event Type Request for Proposal
Title Investment Advisory and Performance Analysis

▼ Reports

- Download All Attachments
- Event Bid Factors
- Event Bidder List
- Event Communications
- Event History
- Event NIGP Codes
- Event Q&A
- Event Users
- Bidder Response Summary
- Bidder Responses
- Single Bidder Response
- Score Summary



Strategic Sourcing Resources & Training

- ★ STARConnection.wi.gov: Click Resources > Finance & Procurement > Job Aids, search for “Strategic Sourcing”
- ★ SBOP website: www.doa.wi.gov/procurement
- ★ Query for registered Bidders list by NIGP Code: WI_SS_BIDDER_BY_NIGP
Query for registered Bidders list: WI_SS_ALL_REGISTERED_BIDDERS
- ★ Strategic Sourcing classes*
 - March 29, 2019
 - June 28, 2019
 - September 20, 2019

**Registration opens in ELM approximately a month before the classes*



